

TIME RUNNING SHORT TO GET TAX FORMS

WASHINGTON -- Taxpayers who need tax forms or publications should act soon to request them, the Internal Revenue Service advised today -- the April 15 filing deadline is only about four weeks away. The IRS has forms available by computer, fax, or mail, as well as at its local offices.

In determining their need for additional forms, people should make special note of three forms related to 1998 tax law changes, but which are not part of the standard tax packages sent by the IRS.

A person who converted a traditional Individual Retirement Arrangement (IRA) to a new Roth IRA will need Form 8606, "Nondeductible IRAs," to report the conversion and determine the taxable amount for 1998. Annual contributions to Roth IRAs or Education IRAs are not reported on the tax return, as these amounts are not deductible.

Taxpayers with more than two children who cannot claim the full \$400 per child tax credit because the credit would exceed their tax may need to complete Form 8812, "Additional Child Tax Credit," if they qualify. The child tax credit worksheets in the tax instruction booklet will indicate whether this additional credit may apply.

People claiming tax credits for college tuition and related expenses will need Form 8863, "Education Credits." The Hope Credit is for students in the first two years of college. The Lifetime Learning Credit applies to any level of post-secondary education, but only for courses starting after June 1998. Expenses for the same student cannot be used for both credits in the same year. The education credits are not available to taxpayers whose income is more than \$50,000 (\$100,000 on a joint return).

The IRS Web site -- www.irs.ustreas.gov -- has forms and publications for downloading. IRS TaxFax -- at 703-368-9694 -- offers 100 forms and their instructions by return fax. Users may find the order numbers in the tax instruction booklet, or may have the system fax a list of available items.

The IRS forms line -- 1-800-TAX-FORM (1-800-829-3676) -- is open 24 hours a day, seven days a week. Taxpayers should allow up to 15 workdays for processing of phone orders.

(more)

In addition to regular weekday hours, about 250 local IRS offices are open Saturdays from 8:30 a.m. to 12:30 p.m., through April 10. Taxpayers may pick up forms or publications, or meet with IRS assistants. They may call the toll-free, 24-hour help line at 1-800-829-1040 to find the nearest IRS office.

Many banks, post offices and public libraries also stock some of the common tax forms. Libraries may also have reproducible forms for photocopying, along with a reference set of IRS tax information publications.

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1999 FILING SEASON STATISTICS

Cumulative through the week ending 3/13/98 and 3/12/99

	<u>1998</u>	<u>1999</u>	<u>% Change</u>
Individual Income Tax Returns			
Total Receipts	50,732,000	51,805,000	2.1
Total Processed	41,142,000	40,950,000	-0.5
E-filing Receipts:			
TOTAL	18,796,000	21,637,000	15.1
TeleFile (phone)	4,597,000	4,353,000	- 5.3
Computer	14,199,000	17,284,000	21.7
Tax Professionals	13,649,000	15,853,000	16.1
Self-prepared	550,000	1,431,000	160.3

Refunds Certified by the Martinsburg Computing Center:

Number	37,418,000	37,560,000	0.4
Amount of principal	\$53.048 billion	\$61.470 billion	15.9
Average refund	\$1418	\$1637	15.4

Direct Deposit Refunds:

Number	13,628,000	16,569,000	21.6
Amount	\$25.723 billion	\$34.984 billion	36.0